

ALLY Eligibility Requirements and Partnership Activity Definitions

This document provides two types of information that potential ALLY Organizations should review prior to submitting an application:

- **Eligibility Requirements:** Information on eligibility requirements for organizations that would like to become an ALLY
- **Partnership Activity Definitions:** Definitions that clarify what qualifies as a partnership activity under each area of the *ALLY Partnership Application*.



Review of this document will assist prospective ALLY Organizations in properly completing the ALLY Partnership Application and Performance Scorecard.

Eligibility Requirements

Potential ALLY Organizations should first review the ALLY Organization Types, their associated Operating Characteristics, and Performance Activity Rating to determine eligibility.

Organization Core Functions

- Be based in the United States
- Have existing relationships with industrial end-users and provide industrial energy efficiency resources—a product, service, technology, or program
- Have an established communication network to distribute information without the need for utilizing or requesting distribution lists/methods from the Industrial Technologies Program (ITP)
- Play a major role in promoting and improving energy efficiency across the U.S. manufacturing sector
- Have the ability to make a tangible contribution to the mission and goals of ITP and *Save Energy Now*, including reducing energy intensity in the industrial sector
- Provide contributions to the ALLY initiative at no cost to the government
- Energy efficiency is included in organizations mission statement
- Freely distribute or promote energy efficiency information or equipment to industry and the general public.

Organization Types

Product & Service Provider

Defined as vendors, suppliers, architectural and engineering firms, and consultants that deliver energy efficiency products and services to the industrial sector, provide on-site service and support for energy and process systems, provide specialized services for a specific need that results in energy savings (e.g., management software for tracking energy baseline), and/or provide other industrial vertical market support.

Trade Associations & Member Organization

Defined as membership-supported organizations—specifically nonprofit or non-governmental organizations—with a mission to promote, offer assistance, and represent the interests of the industrial sector and energy efficiency.

Program Partner

Defined as organizations with existing industrial energy efficiency programs and resources (e.g., state-, utility-, financial assistance providers, or university-based programs) or other nonprofits (e.g., energy efficiency program administrators, regional energy efficiency organizations, Manufacturing Extension Partnerships, or pollution prevention organizations).

Operating Characteristics and Involvement in Energy Efficiency

An organization earns ALLY recognition by performing activities that lend support to ITP’s mission to reduce energy intensity in the U.S. industrial sector, and are consistent with the goals of encouraging continuous energy improvement in manufacturing and providing technical and financial energy efficiency services for industry, such as the following examples:

- **Product and Service Providers** must demonstrate that they have worked with an industrial partner on three or more energy efficiency projects within the last year (i.e. installation of energy savings software or equipment, specialized energy consultations, cost-share technology deployment, development of energy baseline and management plan, etc.) and be willing and able to discuss project scope and savings results.
- **Trade Associations and Member Organizations** must demonstrate involvement in two or more industrial energy efficiency related educational and awareness efforts, marketing efforts, public relations efforts, or sponsored conferences within the last year connecting stakeholders to resources, technologies and information to drive implementation of industrial energy efficiency improvements.
- **Program Partners** must demonstrate mutually productive dialogue established at the state, regional, or national level and strive to expand public awareness of industrial energy efficiency. Program Partners must demonstrate they have administered a variety of three or more activities such as educational programs, trainings, development and distribution of publications, or attended, co-hosted, or hosted conferences, meetings, or similar events involving self-organized networks; these activities should recognize and strengthen the participants’ respective roles in implementing industrial energy efficiency within the last year. The applicant must also provide some level of direct support to the industrial sector by delivering assessments, project demonstrations, or other technical/financial assistance.

Performance Activity Rating

To receive an activity performance rating, organizations must provide a numerical and descriptive account of the activities conducted (regardless of organization type). To ensure accurate analysis, ITP applies limitations on activities conducted, as follows:

- There must be at least 2 activities conducted within the ALLY Partnership Application, and an organization must demonstrate the ability to remain active in consecutive calendar months from the date of application
- Activities will be evaluated and scored via a Performance Scorecard rating on a scale from 1-50
- An interested organization’s Performance Score is based on direct and indirect benefits associated with each activity’s impact on ITP and industry and must achieve a rating of 38 or higher to be eligible.
 - Direct Benefits include providing assessments, technical assistance, or project implementation/technology deployment to LEADER Companies that lead to energy savings
 - The Performance Scorecard values for providing assessments, technical assistance, or project implementation to LEADER Companies or other industrial companies will be based on a company’s annual amount of energy consumed, either in BTUs or dollars spent, classified by annual energy consumption:

Organization Type	Total Sum of Direct Benefit Activities Weighted As	Total Sum of Indirect Benefit Activities Weighted As
Product and Service Providers	70%	30%
Trade Associations and Member Organizations	30%	70%
Program Partners	50%	50%

- High – greater than 1 Trillion BTUs (TBTU), or greater than \$10 million
- Medium – between 1 Million Btu (MMBTU) and 1 TBTU, or between \$100,000 and \$10 million
- Low – less than 1 MMBTU, or less than \$100,000.
- LEADER Fact sheet will provide ALLY Organizations with LEADER Company requirements
- Indirect benefits include providing technical case studies, fact sheets, and success stories on results; hosting conferences, trainings, Webinars, events, and workshops; providing exposure at trade shows and expos; submitting articles, providing speakers, and distributing materials
- Direct and indirect benefits will be weighted according to organization type
- Separate activity groups are required for adequate comparison among similar organizations
- A shift performance curve may be utilized to ensure adequate evaluation
- Organizations submitting “Other” activities will be scored at ITP’s discretion.

Partnership Activity Definitions

ALLY activities fall within two categories of importance to qualifying for ALLY recognition: directly and indirectly beneficial to ITP. Directly beneficial activities lead directly to energy savings with LEADER Companies at a reduced cost to DOE, while indirectly beneficial activities may or may not lead to energy savings, as the correlation may not be measureable. The following offers a description of each of the activities that potential ALLY Organizations will be evaluated on.

Directly Beneficial Activities to LEADER Companies

The activities below are seen as highest in strategic value as they lead to direct energy savings. Providing assessments, technical assistance, or project implementation/technology deployment support to LEADER Companies are the most valuable activities an ALLY can perform. These activities must include a description of the efforts within the past year, such as any interaction to assist LEADER Companies in reducing energy intensity. The value of these activities is weighted differently for each ALLY Organization Type, since each has an inherently different focus (as defined in the Performance Scorecard). ITP reserves the right to evaluate and adjust performance activities on a +/-1 range of the value listed in the Performance Scorecard, therefore the ultimate value of each activity will be determined at the discretion of ITP.

- **Assessments:** The number of assessments performed for LEADER Companies and/or industry by the applicant within the past year. This should include the type of assessments and the amount of involvement with the LEADER Companies. This information should also include ongoing communication of technical or programmatic information with companies by mail or e-mail.
- **Technology Assistance:** This includes what types of technical assistance were delivered via what method, the relationship with the company, what services were delivered and via what method (training, Webinars, development of an energy management plan, development of measurement and verification protocols, providing engineering and feasibility studies, and benchmarking metrics for best practices related to energy savings from a financial investment perspective, etc.)
- **Project Implementation/Technology Deployment:** The number of projects implemented or technologies deployed within the last year that are beneficial to LEADER Companies and industry in achieving energy efficiency goals and in which the applicant played an integral part in deployment. This should include the name of the technology, company/customer partnered with, and energy savings associated with the technology.

Indirectly Beneficial Activities to Other Industrial Companies

These activities have a direct impact on reducing energy intensity but do not directly reduce costs for DOE and therefore are not weighted as heavily as directly beneficial activities. Organizations can provide assessments, technical assistance, or project implementation/technology deployment activities identical to the above definitions.

Other Indirectly Beneficial Activities

The activities below do not have a direct impact on reducing energy intensity and are not weighed as heavily as directly beneficial activities. The value of these activities is weighted equally for all ALLY Organization Types. ITP reserves the right to evaluate and adjust performance activities on a +/-1 range of the value listed in the [Performance Scorecard](#), therefore the ultimate value of each activity will be determined at the discretion of ITP.

- **Case Studies:** A case study is a document or report created and released by the applicant, together with the end users organization, for the benefit of industry in general, and LEADER Companies more specifically, that highlights the industrial end-user's experience that resulted in energy savings, such as the delivery and implementation of energy efficiency equipment or services, on-site support, or specialized services regarding processes for specific needs. The applicant should provide details on the implementation of energy efficiency improvements, the reduction of industrial energy intensity and carbon emissions, and activities leading toward the promotion of cutting-edge research, technology deployment, and development activities. Case studies must follow guidelines provided in the case study guidance document and must be submitted utilizing the EERE template with the Partnership Application and Performance Scorecard. A sample case study and the EERE template can be downloaded via the Partnership Application activities section or the *Save Energy Now* ALLY home page. Awarded organizations are encouraged to submit case studies throughout the year to SaveEnergyNow@ee.doe.gov to showcase continuous involvement in energy efficiency projects.
- **Hosted Training:** A training session hosted by the applicant that was beneficial to industry and LEADER Companies in achieving energy efficiency goals. This should include trainings on system-wide and component-specific technologies to reduce energy intensity, development of energy management standards, sustainable and self sufficient energy efficiency software or certification, and other ITP program deliveries to groups of companies.



- **Hosted Webinar:** A Webinar hosted by the applicant that was beneficial to industry and LEADER Companies in achieving energy efficiency goals. This should include Webinars on the various ITP resources and the LEADER initiative, state or regional energy efficiency resources, programs and incentives, energy efficiency implementation projects, event/workshop or presentation results and best practices, or financial assistance/involvement in the deployment of industrial technologies.
- **Show / Exposition:** A networking event to advocate industrial energy efficiency programs, incentives, technologies, or other services at which the applicant promoted, hosted a booth, or attended in a role requiring the dissemination of information. This should include industry events, such as trade shows, workshops, and expositions that promote ITP resources.

- **Speaker:** A speech or presentation given by a representative of the applicant to promote energy efficiency policies, programs, and/or services while acting within an official capacity for the company. Applicants must show capability to provide speakers to represent DOE and the industrial sector.
- **Articles / Publications:** A published piece of literature that was written or co-written by a representative of the applicant. This should include articles, journals, handbooks, reports, summary tables and charts, implementation plans or fact sheets featured in customer newsletters or posted on applicant or customer Web sites. These publications should be readily available to industry, and the applicant must demonstrate the ability to distribute and reach companies en masse.
- **Hosted or Co-hosted Meeting:** A meeting hosted or co-hosted by the applicant that was beneficial to industry and LEADER Companies in achieving energy efficiency goals. This should include specialized topic discussions, such as industry specific forums on reducing energy intensity and cost reduction strategies.
- **Distribution Materials:** Any brochures, pamphlets, posters, or other promotional materials created by the applicant that advertise its efforts to promote energy efficiency (i.e., specialized financial, consulting or technical services or assistance, technologies, or other programs). This also includes materials requested by organizations from ITP.
- **Other:** Activities not otherwise listed above that are beneficial or raise awareness to industry and LEADER Companies in achieving energy efficiency goals.

Partnership Commitments

An ALLY Organization is committed to taking action in the area(s) indicated on the ALLY Partnership Application Form and Performance Scorecard. For the designated program area(s), partner organizations agree to fulfill all requirements as outlined in the following supporting documents:

- ALLY Eligibility Requirements, defining requirements for being recognized as a partner in each program area, such as a product and service provider. Specific requirements include activities for each area of participation and updating DOE/ITP on the efforts undertaken through the partnership. Where applicable, these include defining energy savings and other performance specifications after participating in assessments, technical assistance, and project implementation/technology deployment in association with industry.
- ALLY Logo Usage Guidelines, describing how the *Save Energy Now* ALLY name and logo may be used. Partner will adhere to these guidelines and ensure that its authorized representatives, such as advertising agencies and distributors, are also in compliance.

DOE/ITP will undertake a variety of efforts to build awareness of the ALLY partnership, maintain the credibility of ALLY, and promote the benefits of energy efficient products, services, and industrial facilities.

DOE/ITP will strive to do the following:

- Increase awareness of the ALLY brand and logo across industrial sectors by distributing key messages on the benefits of ALLY services and products
- Make any updates to the ALLY guidelines and requirements easily accessible through the EERE Web site and Energy Management Portal
- Create and maintain awarded organizations' company profiles in the Energy Management Portal, where partners can furnish information on energy efficiency efforts and provide responsible key contacts
- Provide awarded ALLY Organizations with public recognition—through the Web site and other mechanisms, newsletters, showcases, etc.—for their efforts as ALLY Organizations of DOE/ITP and their roles in building and promoting continuous improvement in industrial energy efficiency leading to verified energy savings.

EERE Information Center
1-877-EERE-INF (1-877-337-3463)
<https://www1.eere.energy.gov/informationcenter/>

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